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# ELECTRONIC DOCUMENT REVIEW (EDR) USER GUIDE

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## PLAN OF DEVELOPMENT APPLICATIONS

November 29, 2017

Maricopa County Planning and Development Department  
501 N. 44th Street, Suite 200 Phoenix, AZ 85008  
[www.maricopa.gov/4493/EDR-Planning-Applications](http://www.maricopa.gov/4493/EDR-Planning-Applications)

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## Electronic Document Review (EDR) Application Process

Electronic Document Review (EDR) is a new on-line planning application submittal process provided for limited number of Planning Services applications. EDR allows applicants to access the [On-line Permit Manager](#) (also known as Citizen Access Portal) to file a planning application electronically for application submittal to receive review comments. The on-line system involves a 7-step process for submitting application, upload of Adobe PDF application materials, payment of fees and obtaining a tracking number. The process allows you to submit and check the status of the EDR submittal on-line 24 hours a day, 7 days a week.

**Please note:** All EDR application submittals go through the same standard review process as hardcopy paper submittals. Submittal of an EDR application does not expedite the review.

The benefits of the EDR application process eliminates the need for multiple paper copies and a saves on trips to the Maricopa County Planning and Development Department for submittal of application, revisions or modifications. The electronic copy of application materials are simultaneously routed to all County agencies for review/comments. The process will provide the applicant redlines and comments from all agencies in a single consolidated document.

Identified below is a quick checklist of items required to process an application on-line:

- ✓ Setup an On-line Permit Manager Account via [On-line Permit Manager](#) (also known as Citizen Access Portal)
- ✓ EDR Application User Guide – Plan of Development Applications – Provides detailed instructions on the application requirements and the on-line submittal process
- ✓ Completed and signed Plan of Development Application and supporting documents saved in Adobe PDF format
- ✓ Trust account, credit card or bank account to pay application fees

The on-line application process includes a streamlined 7-Step process on-line. The submittal allows you to save a pending application and come back at a later date to complete the submittal. A temporary number will be generated if you decide to hold off on application submittal. Please note this temporary number does not start the review clocks and is not routed to the Digital Counter for processing.

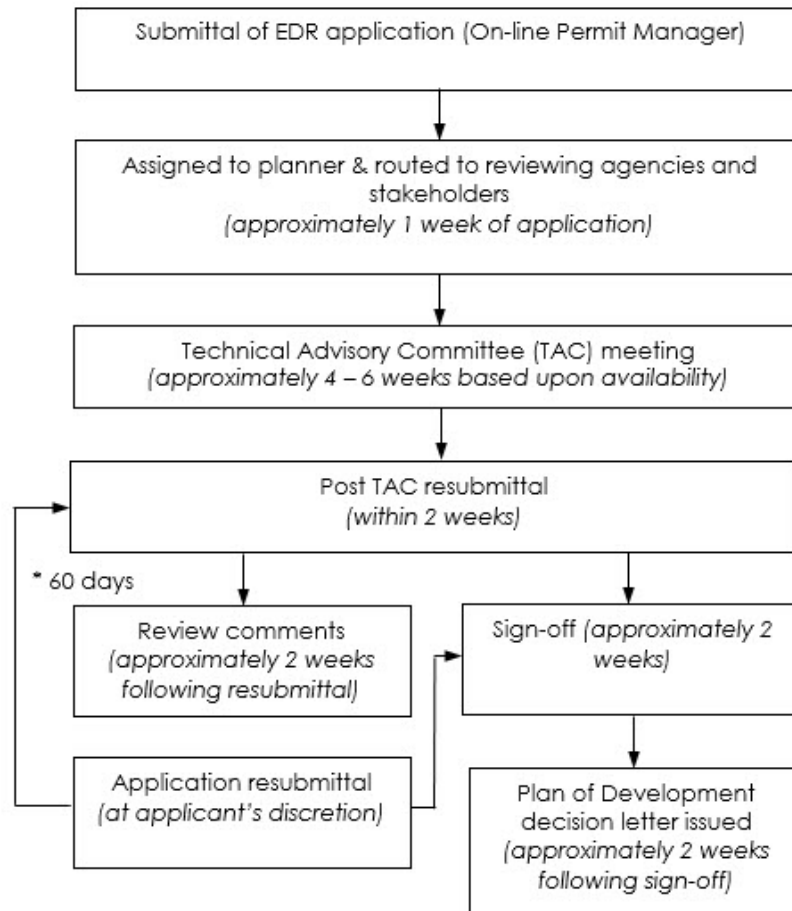
The streamlined process includes the following screens:

1. **Project Information** – description of project and selection of plan of development application
2. **Applicant Information** – applicant contact information
3. **Owner Information** – ownership contact information
4. **Attachments** – upload of application materials
5. **Review** – review of data entry for the EDR application
6. **Pay Fees** – payment of application fees
7. **Initialization** – case tracking number provided



## EDR Application Process & Timeframe

The flowchart shown below identifies the EDR application process and timeframe for the Plan of Development application. A Plan of Development application typically takes about 5 months for processing.



## How to Setup an Account – On-line Permit Manager

Go to the [On-line Permit Manager](#) to register for an account.

**Register for an Account** - Click on 'Register for an Account'. EDR application submittal requires setting up an On-Line Citizen Access account. Begin Account Registration by reviewing and accepting the general disclaimer.

The screenshot shows the homepage of the Maricopa County's Online Permit Manager. At the top, there is a navigation bar with links: Home, Development Services / Code Compliance, Planning Services, P&D Records Request, and a 'more' dropdown. Below the navigation bar is an 'Advanced Search' section. The main content area is titled 'Welcome to Maricopa County's Online Permit Manager.' and contains a welcome message and a list of services: Submit an application for a Building Permit or a Planning Case, Search for a Building Permit, Planning Case, or Code Compliance Case, Schedule an Inspection, and Submit a Public Records Request. On the right side, there is a 'Login' section with fields for 'User Name or E-mail' and 'Password', a 'Login' button, and a checkbox for 'Remember me on this computer'. A red box highlights the 'New Users: Register for an Account' link. A red arrow points from the 'Register for an Account' link in the top navigation bar to the 'New Users: Register for an Account' link in the bottom right. A red box also highlights the 'Create an account by selecting 'Register for an Account' or select 'New Users: Register for an Account'' text in the 'Advanced Search' section.

Register for an Account Login

Home Development Services / Code Compliance Planning Services P&D Records Request more ▾

Advanced Search ▾

Create an account by selecting 'Register for an Account' or select 'New Users: Register for an Account'

Welcome to Maricopa County's Online Permit Manager.  
The Planning and Development Department is now offering expanded online services for customers. In order to access some of the services listed below, you will need to register for an account. This website is compatible with Internet Explorer v11, Silverlight v5, Firefox v51, Opera v42, and Chrome v56. To begin, please verify your browser version and adjust your browser settings to allow pop-ups.

- **Submit an application for a Building Permit or a Planning Case.**  
Once you have registered for an account, you may submit an online application for various permit/case types. Please visit our website prior to submitting, in order to understand the online process and the submittal requirements.
- **Search for a Building Permit, Planning Case, or Code Compliance Case.**  
Utilize the appropriate tab above to search for the review/submittal status of your permit or case. Customers can research a parcel's permit history, view their project status, or check permit conditions.
- **Schedule an Inspection.**  
Once you have searched for your building permit, you can use our online service to schedule an inspection for your project.
- **Submit a Public Records Request.**  
Submit a records request to find Planning and Development records from previous projects.

If you have questions about the online services offered, or if you need assistance, please call our Customer Service team at (602) 506-3301 or email us at [pdcustomerservice@mail.maricopa.gov](mailto:pdcustomerservice@mail.maricopa.gov).

**Development Services / Code Compliance**  
[Search Building Permits/Code Compliance](#)  
[Submit an Application](#)  
[Schedule an Inspection](#)

**Planning Services**  
[Search Applications](#)  
[Create a Planning Application](#)

**General Information**  
[Lookup Property Information](#)

**P&D Records Request**  
[Search Public Records Request](#)  
[Submit a Public Records Request](#)

**MCDOT**  
[Search Applications](#)

Login  
User Name or E-mail:  
  
Password:  
  
  
☐ Remember me on this computer  
[I've forgotten my password](#)  
[New Users: Register for an Account](#)

[Home](#) [Development Services / Code Compliance](#) [Planning Services](#) [P&D Records Request](#) [more](#) ▼

[Advanced Search](#) ▼

### Account Registration

You will be asked to provide the following information to open an account:

- Choose a user name and password
- Personal and Contact Information
- License Numbers if you are registering as a licensed professional (optional)

Please review and accept the terms below to proceed.

**General Disclaimer**

Information presented on this website is collected, maintained, and provided for the convenience of the user. While every effort is made to keep such information accurate and up-to-date, Maricopa County does not certify the authenticity of any information that is provided on this website. Under no circumstances, will Maricopa County be liable for any actions taken, or omissions made, from reliance on any information contained herein from whatever source, nor will Maricopa County be liable for any consequences from any such reliance.

☒ I have read and accepted the above terms.

[Continue Registration »](#)

**Step 1** – Review the General Disclaimer and click the checkbox to accept the terms, click on ‘Continue Registration’.

[Register for an Account](#) [Login](#)

[Home](#) [Development Services / Code Compliance](#) [Planning Services](#) [P&D Records Request](#) [more](#) ▼

[Advanced Search](#) ▼

### Account Registration Step 2: Enter Account Information

\* Indicates a required field.

#### Login Information

\* User Name:

\* E-mail Address:

\* Password:

\* Type Password Again:

\* Enter Security Question:

\* Answer:

#### Contact Information

Choose how to fill in your contact information.

[Add New](#)

[Continue Registration »](#)


**Step 2** – Enter the Account Information and Contact Information and click on ‘Continue Registration’.

***Applicant Tip** – once this information is saved in the system, you can click on ‘Select Account’ during the EDR application process, the database will retrieve your contact information without having to retype or enter the data.*

[Register for an Account](#) [Login](#)

[Home](#) [Development Services / Code Compliance](#) [Planning Services](#) [P&D Records Request](#) [more](#) ▼

[Advanced Search](#) ▼

 Your account is successfully registered.

**Your account has been successfully created.**

Congratulations! You have successfully created an account with the County. An e-mail has been sent to you with instructions for verifying your information. If you have registered as a licensed professional, additional activation by the County may be required. If activation is necessary, another e-mail will be sent notifying you when activation is complete.

#### Account Information

User Name:	appegater
E-mail:	racgeo7@gmail.com
Password:	*****
Security Question:	Name of Dog

#### Contact Information

Rachel Applegater	Home Phone: 602-372-3018
Planning	Work Phone:
501 N. 44th Street	Mobile Phone:
appegater@gmail.com	Fax: 602-506-3301

**Step 3** – Account registration information screen will appear, with confirmation of registration. You will also receive an e-mail confirming account registration.

## Types of Plan of Development Applications being accepted for EDR

Planning and Development has included all of the Plan of Development applications for the EDR on-line application process. The following listing identifies all applications being accepted for EDR submittal.

*Applicant Tip: Please see the individual sections within this User Guide for required application materials, instructions, required attachments and fee structure.*

Plan of Development (POD)

Minor Amendment to Plan of Development (POD)

Major Amendment Plan of Development (POD)

## Download the Plan of Development Application Packet

Download the Plan of Development Application Packet from the [EDR Planning Application Process](#) website. The application packet will contain the application form, processing timeframes, list of submittal documents and the associated review fees.

The application packet has a blank **Plan of Development application form** to be filled out completely with signatures. Once the form is filled out and signed, scan the document as an Adobe PDF for upload on Step 4 - Attachments.

## Submittal Requirements and Recommendations

Please use the following instructions to prepare your documents for electronic plan check. Note that *Plans* have different submittal recommendations than supporting documents/attachments.

- ✓ All PDF files must be under 50 MB in size.
- ✓ Filenames **SHOULD NOT EXCEED 140 CHARACTERS** in length and paper sizes should not exceed **36x48 inches**.
- ✓ Resolution **should not exceed 200 DPI**.
- ✓ Files must be saved in **PDF 1.4 OR GREATER**.

*Applicant – Quick Tip: Retain a copy of the submitted file to later verify the filename and sheet order (during resubmittal). **Revision/Resubmittals may be rejected if not submitted with a filename that exactly matches the original submittal filename.***

### **A. PREPARING PLANS FOR SUBMITTAL**

**Creating PDF's:** Each 'Plan' (or 'Plan set') must be saved as a **flattened/optimized PDF**. Flatten the drawing layers in your CAD program prior to creating the PDF, or use the 'SAVE AS/FLATTENED' and/or **optimized** PDF option available in your PDF tool. Plans that have 'layers' are not acceptable.

Saving PDF's with consistently formatted, sequential bookmarks is helpful and encouraged. If multiple PDF's are merged, verify that bookmarks are consistent. Nested bookmarks are not officially supported. Ideally, a bookmark consists of the Sheet number and a short description (*example: G1.0 General Notes*)

### Naming Plan Sets:

We recommend grouping and submitting plans in smaller, logical sets to facilitate the electronic plan review. If plan sets are larger than the 50MB limit, break the pdf files into smaller sets for on-line submittal.

*Example: Site Plan, if the files are too large, break the document into smaller sets such as follows with the naming convention:*

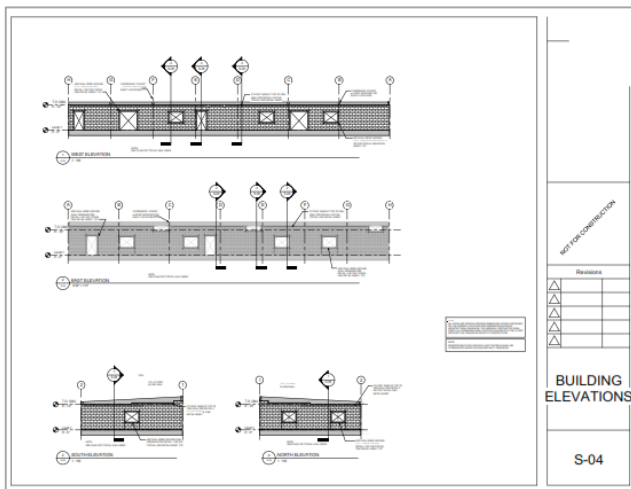
SITE-PLAN\_01  
SITE-PLAN\_02  
SITE-PLAN\_03

### Page Orientation and Alignment:

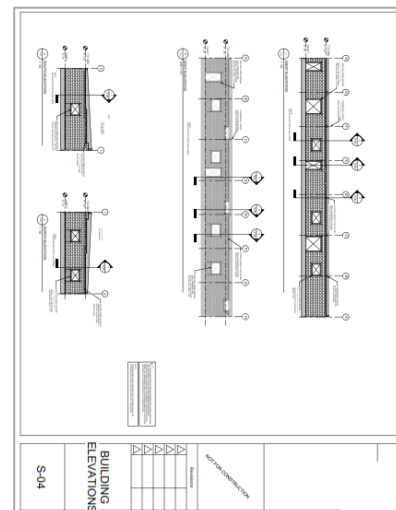
1. Pages must all be properly *oriented*, meaning upright, **not** sideways or upside down, so that the document can be viewed without rotation. Failure to submit correctly oriented plans may result in a 'Hold' being placed on a submittal, which will delay review.

#### Applicant – Quick Tip

To verify that pages are properly oriented, open the document in your PDF application and do a '**print preview**'. Scroll through each page in the preview window to make sure the pages are properly oriented. Make sure the correct paper size is selected.



**CORRECT**



**NOT CORRECT**

2. Alignment: Plan drawings must be created in your CAD program so that drawing perimeters 'line up' exactly when overlaid electronically.

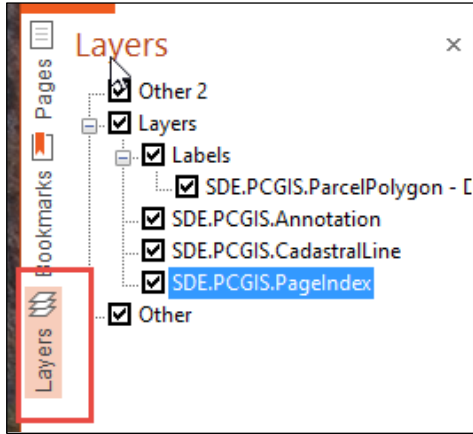


- Revised/corrected plans must 'line up' with the original submittal to facilitate comparing versions electronically.
3. Plans must be saved 'to-scale' to ensure proper measuring of lines and areas electronically.
    - Include a scale on each sheet or include the measurements for each object.
  4. Plans should be plotted/drawn using a black and white plot style. Grayscale, monochrome and colored pens are not encouraged.
  5. Do not submit password protected or locked PDF documents. Plan reviews are conducted on copies of the original files provided. The original PDF's are not changed in any manner.
  6. After saving the CAD files to PDF format, do an annotation check **ensure that no 'comments' or 'editable content' exists** in the file. (Embedded hyperlinks are acceptable.)
  7. Paper plans scanned from a photocopy to PDF format are acceptable, but should be clearly legible and follow the same rules noted above.
  8. Open each PDF using *Adobe Reader/Adobe Pro* and select 'File/Save As'. Adobe is the best tool for resolving corrupted or malformed files. Do not submit PDF's that Adobe indicates are corrupted.
    - Ensure the file name meets the naming recommendations.

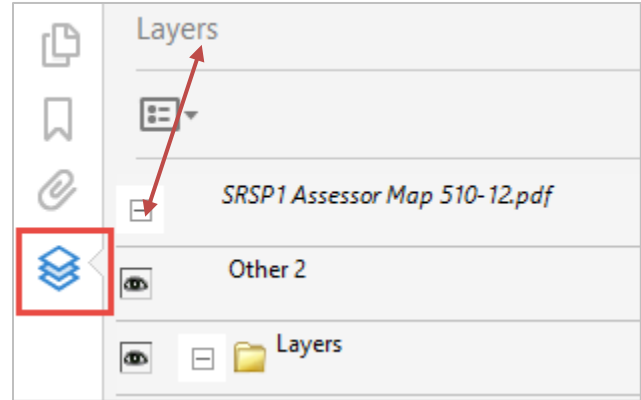
Electronic plan review software relies on correct (PDF/A compliant) information that is embedded in every PDF document (the *metadata*). For intellectual property and security reasons, plan review software does not and should not change incoming files. Here are some guidelines for *resolving potential issues* before you submit your plans.

### How can I tell if my PDF has 'Layers' or other 'Editable Content'?

Most PDF compliant software (like Adobe Reader, Adobe Pro, Nitro Pro, etc.) display a Layers icon when a document contains layers, (see below). The Layers icon is not displayed if the file contains no layers recognized by the PDF tool.



Nitro Pro PDF – with 'Layers'



Adobe Reader PDF – with 'Layers'

Other 'Editable content' includes: active **form fields, stamps, comment or text boxes, signatures, or markups** that can be deleted from the PDF by any user. Editable fields will have a blue background within the PDF. Open the Comment window in your PDF tool to see these types of objects. If any of these are found, please flatten the PDF or remove them. These include plans that use *AutoCAD SHX Text* objects – this font type that has compatibility issues in many PDF viewers.

### Why do 'Layers' and 'Editable Content' need to be removed from the PDF?

Many tools on the market convert CAD drawings/plans to a PDF format. Unfortunately, some of these tools do not properly translate CAD layers or content. Additionally, conversion irregularities introduced by the CAD program or flatbed scanner may introduce errors into the PDF document. Do not submit files with *any editable content*. If an 'object' can be edited or deleted in the PDF, the document is not acceptable.

### Why is page rotation so important?

PDF tools that allow users to 'rotate' pages should properly record that 'rotation' within the PDF document. When this rotation is not properly set by the PDF software, those pages may end up printing upside down or sideways when they are sent to a printer.

### What does PDF optimization do?

PDF Optimization reduces file size by removing embedded fonts, compressing images and removing unused objects and improper metadata. Optimization is critical to reduce or eliminate PDF corruption.

## B. NAMING SUPPLEMENTAL DOCUMENTS

Supplemental documents or attachments are any files that are not plan sets. These may include Permit Applications, Soils Reports, Calculations, images, etc. These must also be **submitted in PDF format with a unique, descriptive filename.**

## Attachments and Naming Convention Structure

There are specific naming conventions that must be followed when saving files for EDR application submittal. The table shown below specifies the required application submittal documents and required naming convention and document description.

*Applicant Tip: All documents must be saved as **Adobe PDFs** for upload and are limited to a 50 MB size limit. If you need to separate documents into smaller files, utilize the naming convention structure as identified in the Naming Sets section of this guide. Example: SITE-PLAN\_01.pdf, SITE-PLAN\_02.pdf, SITE-PLAN\_03.pdf*

### Plan of Development

Required Documents	Plan of Development	Required Naming Convention	Document Description
✓	Plan of Development Application	APPL-FORM	1 <sup>st</sup> Sub-Application Form
✓	Unofficial or Official Recorded Deed(s)	DEED-DETL	1 <sup>st</sup> Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1 <sup>st</sup> Sub-Site Plan
✓	Narrative Report	NARR-RPTS	1 <sup>st</sup> Sub-Narrative Report
✓	Photographs of the property	PHOT-DETL	1 <sup>st</sup> Sub-Photos
	Drainage Report/Plan (if required)	DRAI-RPTS	1 <sup>st</sup> Sub-Drainage Report
	Traffic Impact Study (if required)	TRAF-RPTS	1 <sup>st</sup> Sub-Traffic Report

### Major Amendment to a Plan of Development

Required Documents	Major Amendment to a Plan of Development	Required Naming Convention	Document Description
✓	Plan of Development Application	APPL-FORM	1 <sup>st</sup> Sub-Application Form
✓	Unofficial or Official Recorded Deed(s)	DEED-DETL	1 <sup>st</sup> Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1 <sup>st</sup> Sub-Site Plan
✓	Narrative Report	NARR-RPTS	1 <sup>st</sup> Sub-Narrative Report
✓	Photographs of the property	PHOT-DETL	1 <sup>st</sup> Sub-Photos
	Drainage Report/Plan (if required)	DRAI-RPTS	1 <sup>st</sup> Sub-Drainage Report
	Traffic Impact Study (if required)	TRAF-RPTS	1 <sup>st</sup> Sub-Traffic Report

### Minor Amendment to a Plan of Development

Required Documents	Minor Amendment to a Plan of Development	Required Naming Convention	Document Description
✓	Plan of Development Application	APPL-FORM	1 <sup>st</sup> Sub-Application Form
✓	Unofficial or Official Recorded Deed(s)	DEED-DETL	1 <sup>st</sup> Sub-Deed
✓	Site Plan 24" x 36"	SITE-PLAN	1 <sup>st</sup> Sub-Site Plan
✓	Narrative Report	NARR-RPTS	1 <sup>st</sup> Sub-Narrative Report
✓	Photographs of the property	PHOT-DETL	1 <sup>st</sup> Sub-Photos
	Drainage Report/Plan (if required)	DRAI-RPTS	1 <sup>st</sup> Sub-Drainage Report
	Traffic Impact Study (if required)	TRAF-RPTS	1 <sup>st</sup> Sub-Traffic Report

## Application Fees for Plan of Development Applications – EDR

The table below identifies the type of Plan of Development applications with the associated review fees. Please note the on-line submittal automatically charges the Planning, Drainage Review, MCDOT, MCESD and Addressing review fees. If the site is addressed then an address verification fee of \$10 is assessed, if the site is without an

existing address the Digital Counter upon review of application submittal will notify the applicant of the Addressing review fee of \$50. All application fees are owed prior to routing of the EDR application to County agencies.

Type of Plan of Development Application	Planning Review Fee	Drainage Review Fee	MCDOT Review Fee	MCESD Review Fee	Addressing Application Fee
Plan of Development	<i>\$1,200 + \$100/acre or portion thereof (Maximum of \$50,000) **</i>	<i>\$1,000 + \$500/acre or portion thereof (Maximum of \$11,000)</i>  <i>Disturbance of less than 1,500 sq. ft. \$650 ***</i>	\$250	\$225	* \$10 or \$50
Major Amendment to a Plan of Development	<i>\$1,200 + \$100/acre or portion thereof (Maximum of \$50,000) **</i>	<i>\$1,000 + \$500/acre or portion thereof (Maximum of \$11,000)</i>  <i>Disturbance of less than 1,500 sq. ft. \$650 ***</i>	\$250	\$225	* \$10 or \$50
Minor Amendment to a Plan of Development	<i>\$750 + \$100/acre or portion thereof (Maximum of \$5,000) **</i>	\$650	\$250	\$225	* \$10 or \$50

\* Please note with EDR on-line submittal, the system will automate a \$10 addressing fee. The \$10 fee is based upon if the site has an existing address. If the parcel has not been assigned an address then the Addressing Review Fee will be adjusted to \$50. A change in the application fee will be evaluated as part of the Digital Counter review, and notification will be sent to the applicant to pay the outstanding balance.

\*\* The Planning application fee will be doubled if there is a Code Violation on the property.

\*\*\* The Drainage Review fee for disturbance of less than 1,500 sq. ft. will be evaluated during the Digital Counter Review by staff. Please note the system will auto-generate the standard drainage fee of \$1,000 + \$100 per acre for the Plan of Development and Major Amendment to a Plan of Development.

**Trust Account** – If you will be submitting multiple EDR applications to the County, you might be interested in setting up a Trust Account with the Planning and Development Finance Division. The trust account allows you to deposit monies and the County will draw down application fees from the account. There is a minimum balance required in the amount of \$1,500 that must remain in the account at all times to participate in the program. The Finance Division will e-mail a Trust Account Activity Sheet which will list all deposits and withdrawals on the 1<sup>st</sup> of each month to the listed contact representative.

Contact the Planning and Development Finance Division at 602-372-1359 to obtain the Trust Account Application Form.

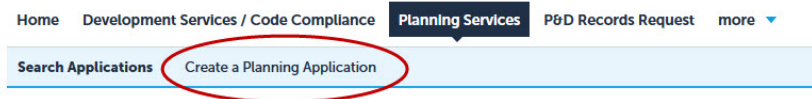
### [Save and Resume Later Option](#)

The On-line Permit Manager has a function that allows application information to be saved and resumed at a later date. Please note the On-line Permit Manager only allows for information and uploaded attachments to remain in

the system for **90 days**, after 90 days the information and any uploaded attachments will automatically be deleted from the system. The temporary files are not transferred to the database, staff does not have the ability to access the information or files on the On-line Permit Manager. After 90 days, the applicant will need to start a new EDR application for processing. Staff will not receive the application until fees are paid and a tracking number has been issued as part of Step 7.

## EDR – Step 1 – Project Information

Once an account has been setup, login with the account information and follow the steps as identified below for the Plan of Development application submittal. Submittal of the Plan of Development application is within the Planning Services module.



Go to '**Planning Services**' located within the top banner. Navigate to the blue banner and click on '**Create a Planning Application**'.

Review the General Disclaimer and check the box indicating that you have read and accepted the terms. Click on '**Continue Application**'.


A screenshot of the 'Online Case Application' page. The top navigation bar is the same as in the previous image. Below the navigation bar, the page title is 'Online Case Application'. The main content area includes a welcome message, a description of the EDR application process, and a section titled 'General Disclaimer' which states that by submitting the application, the applicant agrees to the terms of use, privacy policy, and other terms. Below the disclaimer is a section titled 'Application Requirements' which states that it is the applicant's responsibility to obtain proper authorization from the property owner. At the bottom of the page, there is a checkbox labeled 'I have read and accepted the above terms.' which is checked, and a blue button labeled 'Continue Application »'.

Search Applications Create a Planning Application

### Select a Case Type

Select only one of the following Planning application types by Planning Division, the next step with application entry allow you to specify the type of planning application. Please note payment of the Planning application is required with submittal of the electronic application submittal.

If you are interested in submitting a Land Use Application, click on the Development Services/Code Compliance link to begin the on-line application process and to access the Land Use EDR Application Submittal Guideline.

- Comprehensive Planning
- ▼ Current Planning
  - ☐ Board of Adjustment Cases
  - ☐ Drainage Review Board Cases
  - ☒ Plans of Development
  - ☐ Special Use Permits
  - ☐ Subdivision Final Plats
  - ☐ Subdivision Preliminary Plats
  - ☐ Temporary Use Permits
  - ☐ Zone Changes

Select the drop down arrow next to Current Planning and select '**Plans of Development**'. Click on '**Continue Application**'.

The first step of the application process is to select the correct sub-type of the Plan of Development application.

**Project Type:** There are two selections available, 'EDR Review Project' and 'Project does not require EDR'. Please note it is critical to select 'EDR Review Project' for on-line application submittal and review. The secondary drop down item, 'Project does not require EDR' will generate an auto-scripted message that will stop the temporary use permit application process.

**CAP SubType:** The drop down displays the applications available for EDR submittal. Select the type of application being filed.

**Gross Acres:** This is the total gross acres of the subject site. Please note any portion thereof should be rounded up. For example if the site is 4.7 acres, the number to be submitted with the EDR application is 5 gross acres.

**Result of Violation:** Please check the button to address if there is an existing Code violation on the property.

**Work Description:** This is an open field to describe the project, identify the parcel, and specify the type of application being requested.

The on-line system has the ability to save the EDR application submittal and to resume the application at a later date. Please note a tracking number will not be assigned, a temporary number will be generated and the temporary application will display under 'My Records'.

Once these fields are completed, click on 'Continue Application' to move to Step 2 – Applicant Information.

The screenshot shows the 'Plans of Development' application form. At the top, there are navigation links: Home, Development Services / Code Compliance, **Planning Services**, P&D Records Request, and more. Below these are two buttons: 'Search Applications' and 'Create a Planning Application'.

The 'Plans of Development' section features a progress bar with six steps: 1 Project Information, 2 Applicant, 3 Owner, 4 Attachments, 5 Review, and 6. Step 1 is currently selected and highlighted with a red circle.

**Step 1: Project Information > Information**  
Plan of Development – EDR Application Submittal Guideline

\* Denotes required fields to proceed forward with application.

**Project Information**

**A. GENERAL INFORMATION**

\* Project Type: [?] --Select-- (Callout: There are 2 Project Types selections available, be certain to select, 'EDR Review Project'. EDR Review Project Project does not require EDR. NOTE - selecting Project does not require EDR - will not be processed on-line. An error message will appear.)

\* CAP SubType: [?] --Select-- (Callout: Select the CAP Subtype for the Plan of Development application. The following options are available: POD Major Amendment, POD Plan of Development, POD Minor Amendment)

**D. PROPERTY INFORMATION-ACTUAL**

\* Gross Acres: [?] Acres (Callout: Enter the gross acres fro the subject site. Please note any portion thereof is rounded up. Example: 4.7 acres is rounded up to 5 gross acres.)

**E. CODE ENFORCEMENT**

\* Result of Violation: [?] Yes [?] No (Callout: Click on the button to indicate if there is a code violation on the property.)

**Work Description**

\* Work Description [?] (Callout: Enter the project description, parcel number and request.)

At the bottom of the form are two buttons: 'Continue Application »' and 'Save and resume later'.

## EDR – Step 2 – Applicant Information

This screen displays the applicant information, this will be the primary contact person with the EDR application. Staff will coordinate comments with the listed applicant. Only one applicant be identified for notification. Please note due to creation of the On-line Permit Manager account, you can default your contact information by selecting **'Select from Account'**.

The on-line system also allows you to enter a new Applicant, select **'Add New'** and enter the contact information with first and last name, organization, address, city, state, zip, phone, and e-mail. Click on **'Continue'** when completed.

Home Development Services / Code Compliance **Planning Services** P&D Records Request more ▾

Search Applications Create a Planning Application

**Plans of Development**

1 Project Information	<b>2 Applicant</b>	3 Owner	4 Attachments	5 Review	6
-----------------------	--------------------	---------	---------------	----------	---

**Step 2: Applicant > Information**

\* Denotes required fields to proceed forward with application.

\* indicates a required field.

**Applicant**

---

To add new contacts, click the Select from Account or Add New button. To edit a contact, click the Edit link.

**Select from Account** **Add New**

**Continue Application »** **Save and resume later**



## EDR – Step 3 – Owner Information

This screen displays the owner's information. Please note the system is setup to enter a single property owner. Any additional property owners will need to be submitted as supplemental Plan of Development Applications as additional documents with the upload on the Attachments screen (Step 4 – Attachments). Planning staff will enter the additional ownership in the database upon verification of the additional ownership.

Enter the Owner's name, address, city, state, zip, phone and e-mail. Please note Planning staff will utilize the applicant's information screen (Step 2) as the primary contact with the EDR application and for providing review comments. Once the screen is completed you can click on **'Save and resume later'** or **'Continue Application'**.

[Home](#) [Development Services / Code Compliance](#) **Planning Services** [P&D Records Request](#) [more](#) ▼

[Search Applications](#) [Create a Planning Application](#)

**Plans of Development**

1 Project Information	2 Applicant	3 Owner	4 Attachments	5 Review	6
-----------------------	-------------	---------	---------------	----------	---

**Step 3: Owner > Information**

Please note only one owner can be submitted with the EDR application process, if there are multiple property owners, be certain to have multiple applications available in Adobe PDF for upload with the application. The assigned Planner will be responsible for updating additional ownership into the database.

\* indicates a required field

\* indicates a required field.

### Owner

\*Name ?

\*Phone

\*Address Line 1

\*City

\*State

--Select--

\*Zip Code

\*E-mail

Search

Clear

Continue Application »

Save and resume later

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## EDR – Step 4 – Attachments

This screen allows you to upload the required Adobe PDF plan of development application and documents. Please see the required submittal documents as referenced in this guide.

Applicant Tip: Please note the file size limitation is 50 MB.

Click on 'Add' to attach files.

Once you click on 'Add' a pop-up window will appear, click on 'Add', this will display the files on your computer, navigate to the files for upload and click on 'Open'.

The screenshot shows the 'Planning Services' tab selected in the top navigation bar. Below it is a search bar and a 'Create a Planning Application' button. A progress bar shows six steps: 1, 2 Applicant, 3 Owner, 4 Attachments (highlighted), 5 Review, and 6 Initialization. The main heading is 'Step 4: Attachments > Attachments'. Below this is a link to the 'Plan of Development – EDR Application Submittal Guideline'. A red note states: 'After saving each document, please wait until the "Latest Update" field for each document changes from "Pending" to the current date before continuing with your application.' A small asterisk indicates a required field. The 'Attachments' section has a heading and a paragraph explaining that these are required application forms, narrative, site plan, and support documentation. It also states the maximum file size is 195 MB and lists disallowed file types: html, htm, mht, and mhtml. A table with columns 'Name', 'Type', 'Size', 'Latest Update', and 'Action' is shown, with the message 'No records found.' below it. At the bottom, there is a blue 'Add' button circled in red, a 'Continue Application »' button, and a 'Save and resume later' button.

### File Upload

The maximum file size allowed is 195 MB.  
html;htm;mht;mhtml are disallowed file types to upload.

The screenshot shows a 'File Upload' pop-up window. It contains a table with five rows, each representing a file being uploaded. The files are: APPL-FORM.pdf, DEED-DETL.pdf, DRAI-RPTS.pdf, NARR-RPTS.pdf, and PHOT-DETL.pdf. Each row has a progress bar showing 100% completion. Below the table are four buttons: 'Continue', 'Add', 'Remove All', and 'Cancel'.

The pop-up for file upload will show the file name and percentage of upload.

The pop-up window has the following options:

'Continue' - make this selection if you have completed all upload of file documents.

'Add' – this feature allows you to include additional files.

'Remove All' – this will remove all linked attached documents.

Click on 'Continue', the attachments page will appear showing the files, percentage of upload and document descriptions. Please see the Attachments and Naming Structure within this guide for text to be entered with the document descriptions. Click on 'Save' then click on 'Continue Application'.

Search Applications Create a Planning Application

## Plans of Development

1	2 Applicant	3 Owner	4 Attachments	5 Review	6 Initialization
---	-------------	---------	---------------	----------	------------------

### Step 4 : Attachments > Attachments

Please see the Plan of Development – EDR Application Submittal Guideline for required application documents, formatting, naming convention, and maximum file size.

[Plan of Development – EDR Application Submittal Guideline](#)

After saving each document, please wait until the "Latest Update" field for each document changes from "Pending" to the current date before continuing with your application.

\* indicates a required field.

## Attachments

These are the required application forms, narrative, site plan and support documentation as applicable. Please see the EDR Application Submittal Guidelines for required documents and naming convention.

The maximum file size allowed is 195 MB.  
html;htm;mht;mhtml are disallowed file types to upload.

Name	Type	Size	Latest Update	Action
No records found.				

\* Type: Remove

Plan PnD ▾

File:  
APPL-FORM.pdf  
100%

\* Description:

1st Sub-Application Form

\* Type: Remove

Plan PnD ▾


File:  
DEED-DETL.pdf  
100%

\* Description:

1st Sub-Deed

[Home](#)
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[Planning Services](#)
[P&D Records Request](#)
[more ▾](#)

[Search Applications](#)
[Create a Planning Application](#)



**The attachment(s) has/have been successfully uploaded.**  
It may take a few minutes before changes are reflected.

**Plans of Development**

1	2 Applicant	3 Owner	4 Attachments	5 Review	6 Initialization
---	-------------	---------	---------------	----------	------------------

**Step 4 : Attachments > Attachments**

Please see the Plan of Development – EDR Application Submittal Guideline for required application documents, formatting, naming convention, and maximum file size.

[Plan of Development – EDR Application Submittal Guideline](#)

After saving each document, please wait until the "Latest Update" field for each document changes from "Pending" to the current date before continuing with your application.

\* indicates a required field.

**Attachments**

These are the required application forms, narrative, site plan and support documentation as applicable. Please see the EDR Application Submittal Guidelines for required documents and naming convention.

The maximum file size allowed is 195 MB.  
html;htm;mht;mhtml are disallowed file types to upload.

Name	Type	Size	Latest Update	Action
<a href="#">APPL-FORM.pdf</a>	Plan PnD	24.91 KB	05/17/2017	<a href="#">Actions ▾</a>
<a href="#">DEED-DETL.pdf</a>	Plan PnD	24.91 KB	05/17/2017	<a href="#">Actions ▾</a>
<a href="#">DRAI-RPTS.pdf</a>	Plan PnD	24.91 KB	05/17/2017	<a href="#">Actions ▾</a>
<a href="#">NARR-RPTS.pdf</a>	Plan PnD	24.91 KB	05/17/2017	<a href="#">Actions ▾</a>
<a href="#">PHOT-DETL.pdf</a>	Plan PnD	24.91 KB	05/17/2017	<a href="#">Actions ▾</a>

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[Add](#)

[Continue Application »](#)

[Save and resume later](#)

A summary screen of the uploaded attachments will appear. Please note the section marked as 'Latest Update' must change from 'Pending' to the date of application submittal, do not press 'Continue Application' until you see a date listed for each attachment.

Please note the top banner screen will indicate, 'That attachment(s) has/have been successfully uploaded' – please note this is a standard banner which will upload when the screen loads. There may be instances where the system is still generating the upload, so please wait until a date is identified in the 'Latest Update'.

Click on 'Continue Application' to proceed to Step 5 to review the EDR application.

## EDR – Step 5 – Review

The Review screen is a summary screen of the data entered and uploaded attachments associated with the EDR application. Review each field and make any modifications by clicking on the 'Edit' button. Review the certification statement and click the checkbox verifying application information. Click on 'Continue Application'. See image of the Review screen on the next page.

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Search Applications Create a Planning Application

#### Plans of Development

1	2	3 Owner	4 Attachments	5 Review	6 Pay Fees	7 Initialization
---	---	---------	---------------	----------	------------	------------------

#### Step 5: Review

Continue Application »

Save and resume later

## Case Type

Plans of Development

### Project Information

#### A. GENERAL INFORMATION

Edit

Project Type: EDR Review Project  
CAP SubType: POD Plan of Development

#### D. PROPERTY INFORMATION-ACTUAL

Edit

Gross Acres: 50

#### E. CODE ENFORCEMENT

Edit

Result of Violation: No

### Work Description

Edit

Work DescriptionPlan of Development on parcel 123-00-000

### Applicant

Edit

Rachel Applegate  
PND  
501 N. 44th Street  
Phoenix, AZ, 85008

Phone:6023720318  
E-mail:applegater@mail.maricopa.gov

### Owner

Edit

Applegate  
501 N. 44th Street  
Phoenix AZ 85008  
Phone6025063301  
applegater@mail.maricopa.gov

### Attachments

Edit

Ensure that all required documents show in the "Attachment" section at the bottom of the screen.

The maximum file size allowed is 50 MB.  
htm,html,mht,mhtml are disallowed file types to upload.

Name	Size	Latest Update	Description	Virtual Folders	Action
APPL-FORM.pdf	24.91 KB	08/18/2017	1st Sub - Application Form	1st Submittal	Actions ▼
DEED-DETL.pdf	24.91 KB	08/18/2017	1st Sub - Deed	1st Submittal	Actions ▼
DRAI-RPTS.pdf	24.91 KB	08/18/2017	1st Sub- Drainage Report	1st Submittal	Actions ▼
NARR-RPTS.pdf	4.76 MB	08/18/2017	1st Sub - Narrative Report	1st Submittal	Actions ▼
PHOT-DETL.pdf	24.91 KB	08/18/2017	1st Sub - Photographs	1st Submittal	Actions ▼

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I certify that I have read and understand the instructions that accompany this application and that the statements made as part of this application are true, complete, and correct and that no material information has been omitted. By checking the box below, I understand and agree that I am electronically signing and filing this application.

I also acknowledge and understand that the review of my submittal does not begin until my documents have been accepted for administrative completeness to the minimum submittal requirements and the required upfront fees have been paid.

☐ By checking this box, I agree to the above certification.

Date:

Continue Application »

Save and resume later

## EDR – Step 6 – Pay Fees

The Planning, Drainage Review, MCDOT, MCESD and Addressing review fees are automated with the EDR application. The Pay Fee screen provides three options for payment, **Credit Card, Trust Account or Bank Account** Information. See screen image below:

Home Development Services / Code Compliance **Planning Services** Mc DOT

Search Applications Create a Planning Application

**Plans of Development**

1	2	3 Owner	4 Attachments	5 Review	<b>6 Pay Fees</b>	7 Initialization
---	---	---------	---------------	----------	-------------------	------------------

**Step 6: Pay Fees**

Listed below are the preliminary fees based upon the information submitted. Staff will assess the fees, and notify the applicant if there are any additional fees owed. The following summary display fees by Review Division and total fees owed.

Fees	Qty.	Amount
Review of entitlement plans submitted to the One Stop Shop process	1	\$225.00
Plan of Development(\$1,200+\$100 per acre or portion thereof, Maxium fee \$50,000)	50	\$6,200.00
Plan of Development Review (w/ precise plan entitlements) incl. Special Use plans (except SFR uses)	50	\$11,000.00
Zoning Case (\$250)	1	\$250.00
Address Verification	1	\$10.00

Please select payment method and complete all required fields. The following methods are available for payment:

Credit Card (Visa, MasterCard, Discover, and American Express)  
Trust Account

\$17,685.00

[Continue Application »](#)

The Pay Fee screen provides three options for payment, **Credit Card, Trust Account or Bank Account** Information. See screen image on next page:

Search Applications Create a Planning Application

#### Plans of Development

1	2	3 Owner	4 Attachments	5 Review	6 Pay Fees	7 Initialization
---	---	---------	---------------	----------	------------	------------------

#### Step 6: Pay Fees

Please select a payment method and then fill in all required information.

The available payment methods are:

- Credit Card
- Trust Account

Use the dropdown menu to change the payment type.

\* indicates a required field.

#### Payment Options

Amount to be charged: \$17,685.00

- ☒ Pay with Credit Card  
☐ Pay with Trust Account  
☐ Pay with Bank Account

#### Credit Card Information:

\*Card Type:  \*Card Number:  \*Security Code:

\*Name on Card:  \*Exp. Date:

#### Credit Card Holder Information:

☐ Auto-fill with

Country:

\*Street Address:

\*City:  \*State:  \*Zip:

\*Phone:

E-mail:

Submit Payment »

Please note the application will not proceed past the Digital Counter Review (Front Counter Acceptance and Fees Payment EDR workflows) until the Addressing payment is received.



## EDR – Step 7 – Initialization

The screenshot shows the 'Planning Services' tab selected in the top navigation bar. Below the navigation bar, there are links for 'Search Applications' and 'Create a Planning Application'. A 'Plans of Development' progress bar is visible, with steps 1 through 7. Step 7, 'Initialization', is highlighted with a red circle. Below the progress bar, the text 'Step 7: Initialization' is displayed. A green success message states: 'Your application has been successfully submitted. Please retain the case tracking number for your records.' Below this message, a thank you note says: 'Thank you for the EDR submittal of the Plan of Development application. For your records, the Planning case tracking number is Z2017040.' A note at the bottom states: 'The assigned Planner will be in contact with the applicant on the status of review. Please note that at any time you can access the On-line Permit Manager (Citizen Access Portal) to check the status of your case.' At the bottom left, there is a blue button labeled 'View Case Details »'.

The final step in this process is the initialization screen which will provide a case tracking number.

The tracking number will also be displayed within the 'My Records' screen.

## Validation of Submitted Attachments

Please validate that all submitted attachments are linked with the case tracking number. Click on the '**View Case Details**' button on Step 7 – Initialization. Click on '**Record Info**' and select '**Attachments**'. Please ensure that all documents were uploaded with the EDR application and are shown within the table of the Attachments screen.

## Digital Counter Review and Assessment

Once a tracking number is assigned to the project, the application materials will be submitted to the Digital Counter for review and assessment of fees. The Digital Counter includes the following database workflows (Front Counter Acceptance and Fees Payment).

The Digital Counter will assess fees and notify the applicant to process payment. Once payment has been made, the Digital Counter will push the Front Counter Acceptance and Fees Payment workflows. The applicant will receive an automated e-mail with completion of these workflows tasks.

A secondary auto-generated e-mail will be sent out once the plan of development application is routed to County agencies for review and comment.

## Project Manager – Assigned Planner

The remaining communication of the workflow processes and case status will be coordinated by the assigned staff planner responsible for the review of the case. Review comments and redlines will be provided back through



the On-line Permit Manager for access and resubmittal of documents if required. Approval documents will also be provided via the On-line Permit Manager.

### [Tracking the Status of the EDR Application](#)

Go to the [On-line Permit Manager](#) enter your login username and password.

Click on **'My Records'** on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view applications.

Click on the tracking number to display the application summary.

## ▼ Development Services / Code Compliance

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<input type="checkbox"/>	Date	Permit Number	Permit Type	Description	Project Name	Expiration Date	Status	Action
<input type="checkbox"/>	04/17/2017	<a href="#">LU20170028</a>	Land Use Cases (Select case type on next page)				Applied	
<input type="checkbox"/>	03/28/2017	<a href="#">B201700184</a>	Subdivision Grading and Infrastructure				Initialized	
<input type="checkbox"/>	02/27/2017	17TMP-000187	Land Use Cases (Select case type on next page)					<a href="#">Resume #</a>
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170024</a>	Land Use Cases (Select case type on next page)				Complete	
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170022</a>	Land Use Cases (Select case type on next page)				Applied	
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170020</a>	Land Use Cases (Select case type on next page)				Applied	
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170018</a>	Land Use Cases (Select case type on next page)				Applied	
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170016</a>	Land Use Cases (Select case type on next page)				Applied	
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170015</a>	Land Use Cases (Select case type on next page)				Applied	
<input type="checkbox"/>	02/27/2017	<a href="#">LU20170013</a>	Land Use Cases (Select case type on next page)				Applied	

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## ▼ Planning Services

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<input type="checkbox"/>	File Date	Case Number	Case Type	Description	Title of Project or Request	Status	Action
<input type="checkbox"/>	04/26/2017	<a href="#">Z2017040</a>	Plans of Development	POD Plan of Development	POD Plan of Development	Applied	
<input type="checkbox"/>	04/25/2017	<a href="#">TU2017031</a>	Temporary Use Permits	TU Care Taker Quarters	TU Care Taker Quarters	Applied	
<input type="checkbox"/>	04/21/2017	<a href="#">DRB2017006</a>	Drainage Review Board Cases	DRB Variance	DRB Variance	Applied	
<input type="checkbox"/>	04/21/2017	<a href="#">BA2017013</a>	Board of Adjustment Cases	BA Residential Variance	BA Residential Variance		
<input type="checkbox"/>	04/07/2017	<a href="#">S2017012</a>	Subdivision Final Plats	S Final Plat	S Final Plat	Applied	
<input type="checkbox"/>	03/29/2017	<a href="#">S2017011</a>	Subdivision Final Plats	S Final Plat	S Final Plat	BOS	
<input type="checkbox"/>	03/24/2017	17TMP-000452	Subdivision Final Plats				<a href="#">Resume Application</a>
<input type="checkbox"/>	03/08/2017	<a href="#">DMP2017009</a>	Minor Amendments to DMPs	DMP Minor Amendment	DMP Minor Amendment	Approved	
<input type="checkbox"/>	03/06/2017	<a href="#">Z2017039</a>	Plans of Development	POD Plan of Development	POD Plan of Development	In Progress	
<input type="checkbox"/>	03/06/2017	<a href="#">Z2017038</a>	Plans of Development	POD Plan of Development	POD Plan of Development	In Progress	

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Search Applications Create a Planning Application

Case Z2017040:  
Plans of Development  
Record Status: Applied

Record Info ▼	Payments ▼	Assets
Case Details		
<b>Processing Status</b>		
Related Cases & Permits		
Attachments		

**Applicant:**

Rachel Applegate  
PND  
501 N. 44th  
Phoenix, AZ, 85233

**Project Description:**

Plan of Development

Click on the Record Info dropdown to select Processing Status.


Processing Status screen display the various workflow steps of the EDR application. You can click on the arrow next to the workflow step to display when a workflow step has been completed or is in progress.

Search Applications Create a Planning Application

Case Z2017040: [Add to collection](#)  
Plans of Development  
Record Status: Applied

Record Info ▼	Payments ▼	Assets
---------------	------------	--------

**Processing Status**

 Front Counter
Revisions Received
Fees Payment
Administrative Intake and Routing
Administrative Current Planning Review
Substantive Intake and Routing
Substantive Drainage Review
Substantive Flood Control Review
Substantive Environmental Services Review
Substantive MCDOT Review
Substantive Curr Ping In Progress
Substantive Addressing Review
Substantive Current Planning Review
Planning and Zoning Hearing
BOS Hearing
Case Closure

## Receiving Redlines and Review Comments

The assigned planner will notify the applicant via e-mail or by phone that review comments and redlines are available on the On-line Permit Manager for download. The comments will be a consolidated set of comments from all County reviewing agencies. Any comments received from areas of interest will be sent by staff via e-mail to the applicant.

Go to the [On-line Permit Manager](#) enter your login username and password.

Click on **'My Records'** on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view submitted applications.

Click on the case tracking number to display the application summary. Click on the Record Info to display the drop down selection window and select **'Attachments'**. The Attachments page will display the Corrections Report and Redline(s) available for download.

Click on the file name to open and download comments and redlines.

## Submitting Revisions/Corrected/Updated Documents

1. Revised files are typically one of two types: (1) required resubmittals, or (2) revisions to previously approved documents. Each has different file naming recommendations, as noted below.
  - A. *For required resubmittals:* **Use the EXACT same filename as the original submittal.** Do not change the filename when submitting a new 'version' of your plans or supporting documents – the system tracks versioning automatically. See the chart below.
  - B. *For revisions to previously approved documents:* **Provide a revised file name** instead of using the exact same filename as the originally submitted files. If resubmittals are required, continue to use this revised file name for subsequent resubmittals. See the chart below.
2. **Do not *reorder, extract or insert* pages in the middle of your corrected plan sets.** For example, if a 4-page set of structural plans was returned to you for corrections, resubmit a 4-page set of corrected structural plans in the same page order. *Rearranging, extracting or inserting pages out of order will result in delays for completing your plan review.*
  - A. If submitting *new (additional)* plans, plan sets or supplemental documents:
    - i. **Revised/corrected plans must be submitted in the same page order as the previous submittal.**

- ii. Place new pages at the end of the corrected plan set document. **Do not** place new pages in the middle or beginning of the document. Do not reorder pages within the document.

The chart below shows the addition of two new pages to the *Sprinkler Diagrams.pdf*, with the added pages placed at the end of the set, as page 4-5.

1 <sup>st</sup> Submittal Filename (Original)	Pages	2 <sup>nd</sup> , 3 <sup>rd</sup> , etc. Required Resubmittal Filename	Pages
Floor Plans.pdf	10	Floor Plans.pdf	10
Sprinkler Diagrams.pdf	3	Sprinkler Diagrams.pdf	5
3 <sup>rd</sup> Submittal Filename (Approved)	Pages	Revision to Previously Approved File (New Review)	Pages
Floor Plans.pdf	10	Floor Plans REV.pdf	10

- B. Removing Pages: If pages need to be removed from the plan set, instead of excluding/deleting them, place a 'slash' across those pages in CAD, mark them as 'Omit' and include the date they were omitted.

### Why is page order important?

Resubmitting plans with the pages in the original order ensures that the Plan Checkers review comments and sketches are properly carried forward to the newer submittal/version by the electronic plan review software. This allows for more accurate, expedited document reviews.

### How to Resubmit Revisions

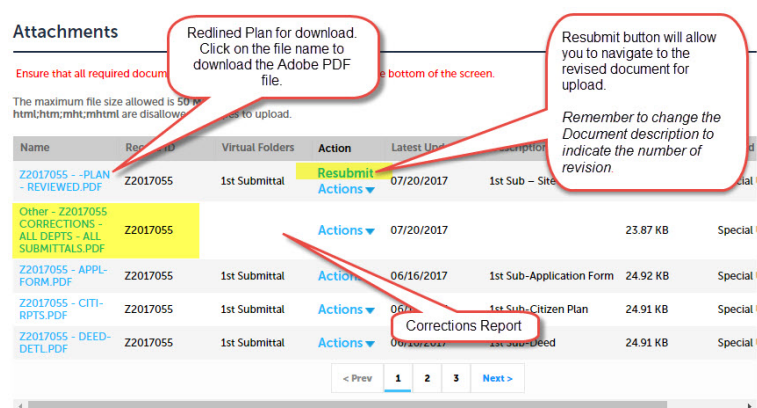
Go to the [On-line Permit Manager](#) enter your login username and password.

Click on '**My Records**' on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view submitted applications.

Click on the case tracking number to display the application summary. Click on the Record Info to display the drop down selection window and select '**Attachments**'.

**Applicant Tip:**— The resubmit button on the On-line Permit Manager only allows for a **single document upload**. Do not select multiple files for resubmittal as this will cause an error in processing.

Click on the '**Resubmit**' icon next to the document that you will be resubmitting. A pop-up window will appear, navigate to the location of the revised documents for upload. Click on '**Open**', the ACA page will load up the revised document, update the



description to indicate resubmittal number. Please note the name of the file should not be changed, also please follow the format as listed in the *Required Attachments and Naming Structure* within this Guide. The only entry required is to update the Document Description to accurately display the resubmittal number.

Example: for secondary submittal on a site plan, the document description would be changed to '2<sup>nd</sup> Sub – Site Plan'.

<u>Plan of Development</u>	<u>Required Naming Convention</u>	<u>Document Description with Resubmittal (2<sup>nd</sup>, 3<sup>rd</sup>, 4<sup>th</sup>, 5<sup>th</sup>)</u>
Site Plan 24" x 36"	SITE-PLAN	<b>2<sup>nd</sup> Sub-Site Plan</b>
Narrative Report	NARR-RPTS	<b>2<sup>nd</sup> Sub-Narrative Report</b>

**Attachments**

Ensure that all required documents show in the "Attachment" section at the bottom of the screen.

The maximum file size allowed is 50 MB.  
htm|htmz|mht|mhtml are disallowed file types to upload.

Name	Record ID	Virtual Folders	Action	Latest Update	Description	Size	Record
Z2017055 - PLAN - REVIEWED.PDF	Z2017055	1st Submittal	<a href="#">Resubmit Actions</a>	07/20/2017	1st Sub - Site Plan	1.70 MB	Special
Other - Z2017055 CORRECTIONS - ALL DEPTS - ALL SUBMITTALS.PDF	Z2017055		<a href="#">Actions</a>	07/20/2017		23.87 KB	Special
Z2017055 - APPL-FORM.PDF	Z2017055	1st Submittal	<a href="#">Actions</a>	06/16/2017	1st Sub-Application Form	24.92 KB	Special
Z2017055 - CITI-RPTS.PDF	Z2017055	1st Submittal	<a href="#">Actions</a>	06/16/2017	1st Sub-Citizen Plan	24.91 KB	Special
Z2017055 - DEED-DETL.PDF	Z2017055	1st Submittal	<a href="#">Actions</a>	06/16/2017	1st Sub-Deed	24.91 KB	Special

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Be certain to change the Description to the resubmittal number:  
2nd-Sub  
3rd - Sub  
4th-Sub  
See EDR User Guide for additional Information

\*Type:  
Plan PnD

File:  
SITE-PLAN.pdf  
100%

\*Description:  
2nd Sub - Site Plan

Click on Save when complete with resubmittal documents.

Save Add Remove All

Click on **'Save'**, scroll between the Attachment page to determine if submittal was successfully uploaded. The Virtual Folder will display the updated file with the submittal number. For example a second submittal will show in the Virtual Folder as '2<sup>nd</sup> Submittal' or show multiple iterations next to the record ID number.

The revised application will be routed to the assigned planner and Digital Counter for processing and routing. Staff will contact the applicant once the revisions are in process for review.

## Attachments

Ensure that all required documents show in the "Attachment" section at the bottom of the screen.

The maximum file size allowed is 50 MB.  
html;htm;mhtml;mhtml are disallowed file types to upload.

Name	Record ID	Virtual Folders	Action	Latest Update	Description	Size	Record
Z2017055 - SITE-PLAN.PDF	Z2017055	2nd Submittal	Actions ▼	07/24/2017	2nd Sub - Site Plan	828.91 KB	Special
Z2017055 - SITE-PLAN - REVIEW				07/24/2017	1st Sub - Site Plan	1.70 MB	Special
Other - CORRECTED ALL DEFECTS SUBMITTAL						23.87 KB	Special
Z2017055 - FORM.PDF					1st Sub-Application Form	24.92 KB	Special
Z2017055 - RPTS.PDF					1st Sub-Citizen Plan	24.91 KB	Special

Attachment page will re-load after clicking 'save', the revised document will appear at top of the screen and the description will change to the resubmittal number and document description.

Example: 2nd Sub - Site Plan

Add

## How to Receive Approval Documents

The assigned planner will notify the applicant via e-mail or by phone that the case has been approved and the stamped approved documents are available on the On-line Permit Manager for download.

Go to the [On-line Permit Manager](#) enter your login username and password.

Click on **'My Records'** on the home banner screen to view applications. The system will automatically default to the Development Services/Code Compliance module with any records submitted, Planning applications will be listed as secondary with a drop down arrow to show submitted applications. Click on the drop down arrow next to Planning Services to view submitted applications.

Click on the case tracking number to display the application summary. Click on the Record Info to display the drop down selection window and select **'Attachments'**. The Attachments page will display the Approved documents within an 'Approved Virtual Folder' for download.

Click on the file name to open and download the narrative report and site plan. The approval letter will be sent via e-mail directly to the applicant by the assigned planner.

## Troubleshooting & Contact Information for Assistance

The EDR application process is compatible with Internet Explorer v11, Silverlight v5, Firefox v51, Opera v42, and Chrome v56.

Please allow for pop-ups as part of the browser settings prior to application submittal.

### AutoCAD 2016 Compatibility Note:

AutoCAD 2016 includes a feature that automatically and by default converts any existing SHX font text within a CAD file into 'editable content/comment objects' when saving to PDF format. This results in a 'comment' being created for each and every SHX text object found.

**Solution:**

To ensure that PDFs created with AutoCAD 2016 (or LT) do not contain these editable objects, please install Service Pack 1 patches for AutoCAD 2016 (or LT) and then proceed to modify the AutoCAD's default settings per the instructions provided in the link below:

<https://forums.autodesk.com/t5/autocad-2013-2014-2015-2016-2017/autocad-2016-shx-text-as-comment-in-exported-pdf/td-p/5555583>

Once these changes have been made, create the PDFs for submittal for plan review following remaining submittal recommendations above.

Optionally, remove all SHX text from the CAD document and replace it with a True Type Font (TTF) text. After generating the PDF from CAD, open each documents using Adobe and do a 'File/Save As'.

For assistance with the EDR application process or to address any questions, please contact the Planning and Development Customer Service team at 602-506-3301 or by e-mail at [pdcustomerservice@mail.maricopa.gov](mailto:pdcustomerservice@mail.maricopa.gov) or contact Rachel Applegate at 602-372-0318 or via e-mail at [rachelapplegate@mail.maricopa.gov](mailto:rachelapplegate@mail.maricopa.gov)